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ABSTRACT

Industrial involvement in school management training programs has been characterized by increasing cooperation. This report of management development programs for head teachers describes the successful types of collaboration between education and industry and applies those experiences to future training programs. Interviews with participants in 10 training programs provide the methodological framework. The context, initiative, content, and outcome of each program is discussed in a case-study analysis. A discussion section identifies four roles in school management training: local education authority; providers; industry contributors; and participants. Each role is examined with regard to design, event, and followup strategies. Recommendations for improving the effectiveness of each role are offered. Appendices include a structured interview guide; education-industry training links; and addresses of Understanding British Industry (UBI) and other central industrial organizations. (LMI)

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PARTNERSHIP IN MANAGEMENT TRAINING: SCHOOL AND INDUSTRY

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by
ARTHUR CHAPMAN

December 1986

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by

Arthur Chapman

1986

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Foreword

UBI began work on management training for head teachers in 1981 in a tentative way. So it is particularly encouraging to be able to write this foreword in 1986 when so much has been achieved by companies and the education service. UBI involvement was tentative initially because, like some companies mentioned in this publication, we were fearful that head teachers would resent the involvement of industry. The contrary has proved to be the case. Moreover, some UBI supporters were critical that UBI was involving itself in a field they saw as marginal to informing pupils about the wealth creating sector. UBI's answer, then and now, is that we have chosen teachers to be our agents for change and it is in our interest to make our agents effective. As this report shows, the aim of management training is to increase confidence and competence. Clearly this is being achieved.

Every manager must have room in which to manoeuvre. Until comparatively recently many head teachers felt they had little room since they were beset by the demands of the examination system, parents, the local authority and society at large. Management training has begun to show them that there is never enough room for manoeuvre unless you take it and use it.

The report emphasises that we must not be complacent about the work that has been done so far. It is for this reason that UBI is delighted that management development programmes are not only being extended to Education Officers but are being received by them so enthusiastically.

J W Nisbet
Director
Understanding British Industry

Preface

From its inception in 1983, the NDC was charged with the task of ensuring that LEAs and schools made good use of management training experience in industry and commerce. It has been greatly assisted in this by staff at Bristol Polytechnic and by those members of its Steering Committee from industry.

In the course of this work the NDC has investigated successful management development and training practice in several companies, organised an invitation conference for industrialists and CEOs, collaborated with Rank Xerox, Understanding British Industry, Hewlett Packard and TVEI on a wide range of management training activities and actively promoted the use of successful techniques from industry when advising the DES and providers on course design and recognition.

This report by Arthur Chapman is important in four respects. First, in it he applies his wide experience in industrial training to the challenges of education management. Second, it confirms a very positive trend - the growing acceptance by educationists of the value and relevance of successful industrial approaches. Third, it is very timely, representing as it does the outcomes of a study carried out during Industry Year. Fourth, the way in which the report was produced in itself is a fine example of collaboration between industry and education: Arthur Chapman was generously funded by Trebor and he in turn drew upon support from Dawn Gumery of UBI and Cyril Poster of the NDC.

For all these reasons, but most of all because the report itself is sound and practical, I commend it to LEAs, industrialists, providing agencies and especially to headteachers and senior staff in schools.

Ray Bolam
Director
NDC

1. INTRODUCTION

Background

This investigative study was commissioned by the National Development Centre for School Management Training and was carried out by Arthur Chapman, until October 1985 a director of Trebor Limited with special responsibility for Corporate Development and Personnel and now a management consultant.

In the three years or so since DES circular 3/83 many new initiatives in school management training have been taken and it was felt timely to review the experience gained and to distil learning points as a guide to future work.

Objectives

- To examine good practice across a range of types of collaboration between Education and Industry.
- To identify learning points as a guide for future training.
- To report and disseminate the findings.

Approach and Method

My own professional background is in Personnel Management in general and Industrial Training in particular. My frame of reference is a perception that both managing and training (and perhaps teaching, too?) are processes, where 'the medium is the message', at least in part; where, in other words, how you manage or teach is as important as what you manage or teach.

The information on which this report is based was gathered in a series of structured interviews with representative providers, industrial contributors and participants covering a range of types of collaboration. The ten case studies that constitute section 3 of this report were selected in consultation with the NDC and Understanding British Industry (UBI) staff. The structured interview guide, which was used throughout, is attached as Appendix 1; the classification system used for selecting the cases, as Appendix 2.

The information was then analysed on the following matrix which was also used as a pattern for the discussion part of the report (section 4).

	Preparation	Running the Event	Follow-up
Providers LEAs Industrial Contributors Participants			

Terminology

This report sets out to be non-technical and self-explanatory, but two words may give some difficulty:

Experiential was often used by people interviewed to denote practical, active training methods in contrast to more theoretical, passive ones. No distinction was made by them, and none is made here, between what has been called 'real experiential learning' (that is, from life itself, reflected upon afterwards) and 'vicarious experiential learning' (that is, from simulations of real life);

Follow-up is used here in two different ways. Mostly it means actions taken after a training event to continue the training process. Thus it may include further training in extension of the original training and implementation of action plans made during training. It does not include, in this usage, evaluation, which is the assessment of the extent to which the training met its original objectives. But, occasionally, it is used as a more generic term covering everything that happens after a training event (as in the column heading in the matrix above). The context will make it clear which meaning is intended.

Acknowledgements

- Dr Pamela Young, University of London Institute of Education, for helping to refine the structured interview guide as well as for being an interviewee.
- NDC staff Ray Bolam and Cyril Poster for guidance and support.
- UBI staff, especially Dawn Gumery, for advice and support.
- The many individuals in companies, schools and other education insitutions who agreed to be interviewed.

2. SUMMARY OF MAIN FINDINGS

There is a healthy diversity of form in school management training which should be encouraged to continue.

The evident will of headteachers and industrial trainers to share and learn has produced much mutual respect which all concerned should strive to retain.

LEAs need clear and well-communicated management development strategies to provide a supportive context for school management training.

All the partners in training - LEAs, providers, contributors and participants - should be involved in the design and planning process.

The training event itself is a powerful, but sometimes under-recognised vehicle for training.

Management training has given headteachers an awareness of management as a process and a feeling of confidence in their own ability to change things. Both should be more explicit amongst the objectives of training.

The popularity and effect of human relations training, using experiential methods, seems to meet a real need among school managers.

A period of residential training using such methods, near the beginning of a longer training event, can greatly accelerate the learning process.

UBI's role in identifying potential high quality contributions and facilitating contacts between education and industry has been very important and should continue.

The networks formed among participants in a training event should be strongly encouraged as a support to follow-up.

Sending senior teachers in teams from schools on management training rather than as individuals is a more powerful vehicle for change.

Secondments need to be managed carefully if they are to succeed, especially the selection and matching of teacher and industrial mentor.

A wider range of companies should be drawn into school management training.

Companies should expect to see benefits for themselves in working with schools.

The skill required to carry new learning back into a school and to share it with the staff needs to be recognised explicitly in training programmes.

3. CASE STUDIES

The following case studies were selected to exemplify good practices. They are not a sample of the whole field of school management training, but were chosen to bring out the variety of endeavour (see Appendix 2).

The focus differs: some cases, for example, are 'close-ups' of a particular industrial contribution to a longer course; others look at the longer course with several industrial contributions in the picture. Even though education-industry collaboration is the centre of the field of interest, it was necessary, in order to make sense of the whole scene, to see the event as a whole in order to judge its effectiveness and that of the industrial contribution.

The cases broadly follow the sequence:

- context
- initiatives
- content
- outcomes

London OTTO

In DES circular 3/83 the University of London Institute of Education was designated a provider of one term training opportunity (OTTO) programmes and has since run five for headteachers, both primary and secondary, mainly from the London region. The courses there are now run by the Education Management Unit (EMU) which works across the whole field of education management as a self-funding entity and will from April 1987 take over all ULIE management courses in the region.

A typical week's programme includes one day for visits, including industrial and commercial ones, and one or more days devoted to a training workshop (eleven days in all, plus several days for preparing and delivering presentations).

Dr Bertie Everard, a former training manager with ICI, who had already conducted a major study on behalf of the The Centre for the Study of Comprehensive Schools (CSCS), was enlisted in the design and presentation of the programme. He brought very considerable experience of industrial training to this task. With his help and through other contacts, including some in the Association of Teachers of Management (ATM), industrial and commercial enterprises were found which would offer help.

The initial reaction of university staff to the idea of industrial collaboration was to see little scope for a useful contribution: industrial management in their eyes was somewhat lacking in credibility. Industry itself tended to be tentative in its response, interested to be asked but not sure at first what it could offer. Headteachers themseves reported many different reactions to an industrial contribution to their training: reservations about the relevance of industrial practice; a welcome for the opportunity to see how industrial management functioned

and what might be relevant; disbelief that industry had anything to teach schools because they were so different. Whatever their initial reactions, headteachers were pretty clear about the objectives of collaboration with industry: to experience expertise in people and resource management; to enhance liaison between industry and education; to acquire some personal skills in managing. One company saw its role as allowing headteachers to draw parallels between industrial and school management. Another regarded it as an exercise in public relations.

Collaboration with industry during the course itself took three forms:

- One-day visits to selected companies such as Plessey, Marks and Spencer, Trebor, Cadbury-Schweppes, Abbey National, Safeway and Peat Marwick, for programmes on topics requested by the providers. (Trebor, for instance, was asked to put on a programme on how top management strategies are translated into individual managers' objectives.)

- Some use of places made available on internal company management training courses (for example on a course on coaching techniques).

- Occasional use of speakers from industry (on the training workshop mentioned above, for example).

The reading material recommended to participants includes texts that are currently fashionable in the business world, such as Goldsmith's and Clutterbuck's 'The Winning Streak' and headteachers have also mentioned 'In Search of Excellence' and 'The One-Minute Manager'.

One effect of the involvement of industry was to remove any scepticism about the relevance of industrial expertise to school management. All of the headteachers interviewed (five in this case) affirmed the value of the industrial components in their courses; and for most of them it was the most significant part of the entire programme. The nature of its significance varied. Some valued the insight into different approaches in different companies - including ruthlessness in one case. For one headteacher, the integrity and professionalism of industrial trainers was an eye-opener. Another became aware of mutual misunderstanding between industry and education. Headteachers also noticed the congenial working atmosphere and the availability of resources in industrial training departments. One noted that industry was always asking for consumer reactions and understood the need for open communication.

The industrial collaborators interviewed were keen to continue their involvement in later courses. One company found real mutual benefit from headteachers taking part in an internal management training course.

Cambridge OTTO

The Cambridge Institute of Education (CIE) ran OTTO courses in 1984, 1985 and 1986 for headteachers from Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk and Suffolk. The course is now run by a tutor in School Management and Organisation in the CIE. He is supported by a policy group of advisers from the six LEAs and a headteacher and a planning group which includes course members as well as advisers, CIE staff and a member of the previous course.

The ten-week course focussed on a series of themes, each for a week or longer, such as 'Management of the School as an Organisation', 'Staff Management' and 'Accountability'. In a typical week two days were spent in the CIE with lectures, group discussions and exercises on the theme for the week. The other days were devoted to visits, including some industrial visits and private study and preparation.

The industrial element in the programme consisted of two-day placements in local companies and lectures from visiting industrial speakers. Headteachers welcomed the industrial component as a way to achieve mutual understanding and 'to live in the real world'. For some interviewed this was a natural reaction, either because they had had commercial experience or had taken part in other forms of Industry-education liaison. Initial fears that they might encounter an arrogant 'we know how to do it' attitude in industry were not justified by later experience. The selection of industrial visits and speakers was made mainly on suggestions from the UBI Eastern Region.

CIE staff felt that the situation in schools and that in industry are too different to allow easy transfer of learning. On the other hand they recognise that schools need managing and there is a benefit in meeting managers in another field: 'it validates their self-image as managers'. Moreover, they can be alerted to extreme attitudes and 'politics' in industry.

The six local authorities had given very different briefs to their nominees, ranging from a requirement to re-design in-service training on returning from the course to an expectation that participants should simply enjoy refreshment and a break from stress. The headteachers interviewed were not clear about what they personally expected from the industrial element in their programme. The industrial collaborators would have appreciated more information about the course as a whole so that they could place their contribution more effectively in context.

Two companies were asked to put on a session on appraisal and prepared and presented it together. A third company dealt with appraisal and with motivation and leadership in the course of a visit to their premises: in both cases the time allotted had been increased from one course to the next. The companies were impressed by the very favourable response they received: the headteachers were open to the alternative approaches displayed to them and became really involved.

The companies visited were enthusiastic to continue with this kind of collaboration and one of them was seeking an opportunity to extend its already very considerable involvement with schools, which included secondments and participation in a curriculum working party as well as contributing to this OTTO course. They measured the value of their involvement by the degree of interest shown by headteachers; by their openness to movement in their attitudes; and by the degree to which heads applied their new insights.

The provider saw the honesty and openness of industrial contributors as the most significant feature of collaboration. Their most valued inputs were on career planning, training strategies to prevent obsolescence and on time management. What was not appreciated by headteachers was being told how to run schools; being treated as left-wing; and the assumption that they were anti-technology and anti-industry! One of the industrialists saw the chief gain as the greater understanding which came from sharing experience and removing barriers on both sides.

Clarks Residential Course Element in Bristol OTTO

Clarks have provided a three-day residential unit for participants on Bristol OTTOs on three occasions since 1984; once on the subject of Team Development and Leadership and twice on Management Development. DRG and Allied Dunbar have both provided two-day units as part of the same OTTO programme. In addition, some heads used their discretionary time to arrange visits to other industrial and commercial enterprises while others have joined in-company courses. Clarks were already involved with schools before 1984, mostly with individuals; but this activity, through its OTTO contribution, has moved into a higher gear, so much so that both Clarks themselves, or at least their trainers, and UBI are somewhat concerned about the demands made upon them.

Their part in OTTOs was the result of suggestions made to the providing partnership, Bristol University/Bristol Polytechnic, by the UBI's South West Regional Liaison Officer. Bristol had a tradition of developing further professional studies and moves were already being made by LEAs and providers in the northern half of the South West, prior to the DES initiative to launch a programme of management activities for headteachers of secondary schools.

The initial reaction of local headteachers was mixed: some questioned whether industry had anything to teach education; some had already had favourable experience of industrial training or preferred to keep an open mind; some even refused to take part. Clarks felt they had something to offer but were a little anxious about its acceptability to headteachers; would the content and their methods be appropriate? They felt the need to negotiate these with providers and participants. On balance, though, they saw it as a stimulating opportunity for their trainers.

Clarks understood that the objective they were given for their module was to train headteachers to be competent in running management development programmes for other senior teachers; in other words, a 'training the trainers' task. They also wanted to lift the reputation of industry; and UBI saw its purpose as to bridge the gap between industry and education and to get communication going.

The providers successfully conveyed the objectives of the course to participants by means of a meeting held, except for the first course, in the term before; they were clear that they were being trained:

- o to improve their ability as managers
- o to run or help to plan management courses themselves
- o to acquire a new perception of industry and be able to borrow from their training expertise (although this was not one of the provider's stated objectives).

Clark's trainers were involved in the first OTTO programme after it had started and the trainers first met the group about one month before the residential unit. The course design was explained but there was little opportunity to change it. For the two subsequent courses the trainers were involved at the planning stage for the whole OTTO programme. It was then agreed that the participants would negotiate their own learning contracts with the providers so that the meeting between Clark's trainers and course members could design the unit to meet their needs.

Participants also felt that they had been able to negotiate the content of the Clark's unit (second and third course), which was largely in the human relations skills area: coaching, listening, communicating, assessing, assertiveness, time management, running meetings, negotiating, conflict resolution, handling change. The learning methods were active and experiential and the residential nature of the event was felt to be an important contributor to success.

Headteachers responded enthusiastically to this programme. The evaluation reports were glowing: they had few changes to suggest; they speak of considerable personal impact and benefit; one declares it to have been the best course he had ever experienced. Clarks, after an initial course, (from which they learned a lot, even though the participants were full of praise for it) had very positive feelings about the courses. They recognised that there were a couple of people on each course who were apparently untouched by the experience, but most were keen and responsive. Many of them have come back to Clarks with requests for help on courses they are running.

A group evaluation was carried out at the end of the OTTO courses and UBI produced an evaluation questionnaire for the industrial elements. The participants arranged a later meeting, partly to evaluate the experience after an interval but mainly to encourage, support and share their implementation action. Clarks have always asked for and used feedback on their contribution from the provider.

There is evidence of the same enthusiasm flowing through into implementation: action plans were being followed through. One headteacher wrote a detailed report on his experience for his staff and shared his action plans with them. The same headteacher also set up an 'Interim Senior Management' structure during his absence and prompted a very thorough review of the developmental value of the experience afterwards.

Barclaycard Attachments

One week attachments of teachers to Barclaycard in Northampton started in 1983 at the instigation of the UBI and a sympathetic Barclaycard manager attending a Heads' Management Training Conference. One place on each in-company Senior Supervisors' Course is allocated to a teacher; up to the summer of 1986, fifteen had attended. In a few cases the attachment was extended to two weeks.

The two-week attachment included attendance at this course for one week and a further week of visits to various departments in the company, agreed between the teacher and the company. The one-week attachment involved attendance at the Senior Supervisors' Course only.

The course provides instruction in basic management skills in areas such as teamwork, problem-solving, decision-making and leadership as well as inputs on company department functions. Participants are drawn from different parts of Barclaycard in order to facilitate 'the exchange of ideas through discussion', which is one of the stated aims of the course.

Where there is a second week, the programme of visits is negotiated between the teacher and the training department staff, which contrasts with the first week in which the content of the course is fixed in relation to the training needs of the senior supervisors who attend it.

The reaction of teachers and the company to this has been very positive, aided no doubt by the fact that the Barclaycard training officer, when the attachments started, was an ex-teacher and the UBI representative an ex-industrial trainer! The UBI's objectives are to influence teachers' attitudes about industry and to provide some personal training for them.

Initially, Barclaycard thought that the benefit might be mainly one-way: that they were doing teachers a favour; but now they see that correcting misunderstanding about industry is as much in their interest as it is in the teachers'. One teacher interviewed felt strongly that the company had derived a great deal of information from him about the ferment of new activities in schools. There was some fear, for one teacher, about being seen as an outsider but that quickly disappeared.

The practical, experiential parts of the course were more immediately interesting to teachers, but the function talks also had a value in giving information about the different sorts of work available for young people; a value very much reinforced by closer examination in the second week. For one teacher this had a very considerable consequence: he had since begun to prepare children a year earlier to apply for jobs and had reshuffled the timetable to make this possible.

Teachers were impressed by the atmosphere of the course and the reception they were given; the course was an enjoyable experience for them. Trainers were initially a little wary of teachers but then recognised a benefit to the quality of the course. There was no formal requirement to participants to make implementation plans but people often did make them. Teachers reported a significant impact on their own ways of working: ranging from recognising the need in oneself to be able to use different methods of treating people to re-writing job descriptions and computerising records.

Barclaycard carried out their own critique of each course with participants; and teachers wrote reports to LEAs, the company and UBI. The latter has also organised review meetings of participants in these and other collaborative events. Contacts between individual teachers and the company on a variety of topics continues.

Both UBI and the company feel that the initiative has paid off; the attachments are universally well-regarded; teachers feel that they are better equipped to give vocational information to children and that they have been helped in developing their personal skills. The UBI comments that 'one of the most lasting influences of the course is that teachers realise how poorly the education sector prepares its managers for their job. They are impressed by the resources devoted to management training ... and the professionalism of the staff involved.' Perhaps the most striking outcome, as seen both by the providers and by the consumers is a gain in confidence: as one senior teacher put it, 'to make changes oneself, to be responsible and well-prepared.'

Royal Insurance Company - Course for School Management Teams

The initiative for these courses, which have been running since 1985, was taken jointly by the Group Personnel Manager of Royal Insurance and the UBI North-West Regional Liaison Officer. UBI, as a direct response to discussion with the North-West School-Industry Liaison Officers, wished to widen the opportunity for local teachers and headteachers to undergo industrial courses. Each course consists of 3 senior staff from each of 5 schools, 15 in all; and by June 1986, about 60 people had attended. The requirement that three senior staff, which always includes the headteacher, attend together is a key feature of the design; its purpose is to surmount the re-entry problem.

UBI looked specifically for a company with a residential facility so as to escape the school environment completely and 'have everything organised'. The course was designed specifically for the senior staff of schools by the company's Management Development Manager and the UBI Liaison Officer, himself seconded from Pilkingtons: there was no involvement of schools in the design of the first two courses, but they have been fully involved in the design of the later ones. The objectives were seen by the organisers, Royal Insurance and UBI, as:

- to provide an exchange to increase mutual understanding
- to help participants realise that they are agents and leaders of change
- to help them apply new skills to their situation
- to give them an appreciation of the requirement for change and adaptability in a large company.

Two senior teachers saw the objectives as:

- personal improvement in the job of senior management (management being different from teaching) and the ability to evaluate systems

- learning how, as a team, to use strategies for change and to adopt them to their situation.

The programme, administered by UBI and run by Royal Insurance trainers, with some contribution from speakers from other companies such as ICI and Pilkington, consists of inputs and exercises in management skill areas, such as leadership and managing change, and inputs on more general topics, such as 'Industrial Skills and Liaison in Education' and 'Industrial Relations and Personnel Development'.

The trainers felt some initial trepidation in dealing with experienced teachers and found some participants a little cynical at first. But teachers responded keenly when they perceived that the training staff were inviting them to join in a dialogue rather than lecturing at them. Some of the talks by external speakers were experienced as somewhat insensitive: 'as though they were being delivered to an industrial audience' in one case; and, in another, as though headteachers had no experience of change! This did not seem to affect the overall reaction to the course, however, which ranged from euphoric to 'left wanting more'.

One feature of the course seemed to make a particular impact. A team from an earlier course reported in a matter-of-fact and unexaggerated way how they had applied the action plan they had made on their course: their results would have been impressive in any context. Participants completed evaluation questionnaires during the course, which were later analysed by the UBI and sent back to the company. A one-day follow-up meeting is held six months or so after each course at which participants make progress reports on their action plans. Also School-Industry Liaison Officers are brought into some of the final sessions as counsellors and enablers.

As both parties see it, the most significant thing about this example of collaboration is the willingness and enthusiasm of the company and its staff to offer a custom-built programme in an ideal setting, a country house residential training centre. The providers see a particular benefit to deputy heads in their acquiring a clear picture of their role and the range of their responsibility. The participants clearly gain much in personal skill development and, at a deeper level, awareness and questioning of their own management style. But also - and at least as important - they take back with them the support of colleagues who have shared their experience.

Oxfordshire Schools Team Secondments

In 1984 the DES introduced 'pooling' for the industrial secondment of teachers, covering thereby a substantial share of the cost. Oxfordshire is one of three pilot schemes launched by the UBI. Wheatley Park School became the pilot for a school-based secondment, in which a team of four teachers at different levels of management in the school spent a substantial period of time (4-9 weeks) in different companies. They together attended an introductory management team building course at Haseley Manor, the Austin-Rover (as it was then) training centre. The exercise was repeated in 1986 for a team of four teachers from Wantage School.

The team members had their own individual objectives during the secondments under the umbrella of a general aim of enhancing their schools' staff development policy and practice. The teams met to share experiences and plan follow-up both during and after the secondments, in addition to preliminary meetings with the UBI representative to determine the aims and identify possible companies for the secondments.

The teachers interviewed saw the secondments as an exciting opportunity to discover how industry works, although they had both had previous industrial contacts. One of them had a concern that the profit criterion of performance was not common to education and industry. This initial enthusiasm was still further enhanced by the two-day event at Austin-Rover, which was specifically designed for the four members of the team as a lead-in to their secondments. The agenda covered motivation and industrial practice, especially in setting management objectives; but the main aim was to bring them together as a group by setting them the task of determining their own objectives for the secondments and putting them through a variety of stimulating exercises.

The Austin-Rover course was run by company training staff with sufficient flexibility for participants to influence the design to take in topics of interest to individuals, such as appraisal. It also had some significant side benefits such as emphasising the value and relevance of induction to education and the need to plan training. But this course was simply a part of a process of Course - Secondment - Presentation - Follow-up/ Implementation and is to be judged by the extent to which it facilitated that process.

Those who took part in the pilot programme produced a well-designed pamphlet on their project, describing the objectives, project tasks and results for each of them; and they reported to the school governors. The 1986 group, too, is putting together a presentation to their governors, the host companies and the UBI. In this case, there is a projected team-building event in 1987 for the members of the school senior managment team to gain support for some of the plans of the four teachers who were seconded.

In both schools it is recognised that implementation of some of the plans made by the teams of four would not be easy. Staff development and appraisal in particular have been sensitive topics in a period of unprecedented unrest in the schools. Nevertheless there are signs of much determination and mutual support in keeping their plans alive.

Independent evaluators, an industrialist in both cases, were appointed and joined in some of the teams' meetings. One of the teachers interviewed commented that evaluation itself was a new idea to him. Some continuing links with local industry have been formed or reinforced. Indeed, one teacher mentioned the continuity of liaison between school and industry as a success criterion for the exercise as a whole.

The effect on the teachers themselves, so they reported, was marked. At the personal level there was a reinforcement of confidence and sense of privilege from taking part. A teacher who was attached to two different

companies saw that many different approaches can work in industry and that, in essence, there is great similarity in managing in education and in industry. There was a greater understanding of what industry is trying to do and a realisation that managing was something different from administration. Teachers very much appreciated the professionalism of their industrial trainer.

Rank Xerox Management of Change Workshops

These workshops are part of a much broader involvement of Rank Xerox with schools. Indeed they were conceived as a result of the company's collaboration with UBI in Awareness of Industry workshops for teachers since 1980. In these workshops, the session which aroused the greatest interest was on 'Management Skills'. It was decided to design a workshop exclusively for headteachers which would focus on the management skills necessary for bringing about change effectively. This was produced by Rank Xerox managers, the UBI regional officer and two headteachers. As an alternative opportunity, Rank Xerox has provided places for headteachers alongside their own managers on in-house management training courses. Both options have been offered for five years or more and about five hundred headteachers have attended.

The Management of Change workshop has three main themes:

Human Relations Skills

- Team-building in an atmosphere of change
- The management of human resources
- The application of management skills in schools

The Management of Change in Business and Education

- The relevance of modern business practices and management skills

Major Issues for industry and education in the Future

- Inputs from senior executives in Industry and Education.

Participants are able to assess their own interactive skills, their management style and their negotiating skills, through exercises and questionnaires; and they produce action plans to apply what they have learned.

They also inevitably acquire an insight into the ways in which a large sophisticated company trains its managers. Most of them are highly impressed by the professionalism of the trainers and the quality of the training environment. A further benefit, reinforced by the follow-up courses, is the network of contacts with which participants are furnished; but where the 'catchment area' is very large the benefit may be somewhat reduced in practice.

At the end of the first workshop it was decided to hold a Management of Change Part II workshop as a follow-up. This became the standard practice until recently when both the workshops amalgamated. A further, third stage follow-up, for people most of whom returned in the same groups, focuses on Information Technology and continues as a separate workshop.

The Part II workshop is once again based on group exercises, self-analysis and discussion in the following topic areas:

- Staff development strategy - selection processes, team profiling
- Staff development practices - objective setting, performance review and appraisal, self-development
- creative problem solving, using 'real-time' critical issues brought by the participants.

As for Part I, participants are asked to produce action plans to be implemented back at school.

The skills developed in the two Management of Change workshops are still further reinforced in the subsequent Information Technology workshop where they can be applied to the issues in that field.

This whole sequence, therefore, is designed to reinforce the idea that management training is a continuing process, not an isolated event; a message which is reflected in the reports of headteachers on the application of their new insights and skills 'on the job'.

The headteachers interviewed saw the care and professionalism of the Rank Xerox training as the most significant element in the exercise: they appreciated the empathy of the industrial people for their world. The training gave their self-confidence a boost, through the process of learning about their management role in company with others. The company, for its part, recognises the essential similarity of managing in schools to managing in industry which makes a 'lasting and close association' worthwhile.

Burmah-Castrol/Kingsdown School Attachment

The attachment of the headteacher of Kingsdown School to the training department of Burmah-Castrol in the first half of 1986 came about as the result of contacts in the local CBI council between the UBI South West Regional Liaison Officer and the company's Personnel Director. The head was, at the time, attending the Spring Term 1986 Bristol OTTO course. The attachment to Burmah-Castrol was proposed by the UBI as a follow-up to the OTTO programme.

The headteacher saw it as a valuable opportunity to become immersed over a longer time in industrial training, in a way that was not possible on a course such as OTTO. The company initially wondered what it had to offer and the manager most involved was concerned about how much time it would take in an already busy existence. The declared overall aim was to build a bridge between schools and Industry. Both parties saw the more specific objectives of the attachment as:

- gaining insights into the philosophy and processes of training in the company
- getting actual experience of training processes as a trainer
- further training in management.

The training manager and the headteacher involved met often to plan, progress and review the project, first identifying areas of common interest and then selecting a current, live situation with which the training manager was dealing. It was an issue of some sensitivity which required that the headteacher's participation had to be carefully thought out and monitored. The manager talked through the problems, using the headteacher as a 'speaking partner' as the project unfolded. There were some episodes from which the headteacher as an outsider had to be excluded; but, between them, the manager and the headteacher found alternative avenues of participation. For example, part of the training design involved sending a group of people on a specific external course. It was not judged wise for the headteacher to attend the same course, but he did go on another almost identical 'open' course. An effort was made to engage him in the process of getting close to the people involved, becoming clear about the real training needs, examining alternatives and determining and reviewing the action taken.

At the end of the attachment, the manager and the headteacher evaluated the attachment in the light of the objectives they had originally agreed. They both adjudged it a success in terms of the objectives. The manager, in spite of his initial question about what he could offer and his continuing concern about time constraints, still felt he would repeat the exercise if asked. He recognised the benefit he had received from his partner's questioning throughout the project. For his part, the headteacher identified important personal benefits from the experience. He had taken hold of the message that training should be about meeting the clearly identified needs of individuals and of the organisation; and, in terms of personal skills, he had recognised some important management lessons - and he had sought feedback from staff at school and gained some reinforcement from them.

An obviously important factor in the success of this sort of attachment is the relationship between the individuals, in this case a headteacher and a training manager. The success of this may be seen in their further plans for continuing collaboration: the personnel director of the company has spent a day in the school and there is a plan for the headteacher to join in some Personnel Management meetings in which the staff are thinking through their objectives and their work; and he is also attending a company Assessment Centre as an observer.

The training manager felt that the most significant feature of their collaboration was the decision to work on a specific training problem; and the fact that it was a difficult and sensitive one gave additional benefit. With so many new initiatives in the world of education he saw the time as ripe for companies to provide this sort of help.

British Gas, South-Western, Attachment

The attachment of a head of faculty from a tertiary college to British Gas in the south-west was one of a series of twenty or so attachments in the region. They were arranged to provide industrial experience mainly for deputy heads or senior staff from schools and colleges and were organised by LEAs and UBI in the south-west. British Gas has had strong linkage with education for at least five years and, amongst other things, the company has provided one-day seminars for headteachers on topics such as Staff Development and Training Methods. British Gas, South-Western was asked in 1985 by UBI to take this head of faculty - whom I interviewed - and a second teacher on short attachments.

The attachment examined here lasted two weeks but it was part of a twenty day process which began with five days induction training, mainly about the various functions with a company. Then came the ten days attachment; and, finally, the remaining days for evaluation and review. The broad programme was planned by the local UBI liaison officer and a Local Authority careers adviser, aided by a steering group which included industrial training staff.

This teacher was attracted by the chance of learning about and from industry; he looked to learn something that he could translate into managing a college faculty and, more broadly, into the management of the college as a whole; in particular, he had felt the need for help with long-term planning. The manager in British Gas who had to plan the programme in detail saw it as part of his company's traditional interest in education but was also attracted by the novelty of the idea.

He met the two teachers who were to work in the company, clarified their objectives and with them produced a programme of visits to departments and meetings with managers. This had to take account of the practicalities of the moment: for example, it was possible for the teacher who had expressed an interest in consultation between management and unions to take part both in the preparation for an Industrial Relations meeting and in the meeting itself. Some flexibility was called for from both sides in order to get the best out of the opportunities available.

In addition to consultation, the following areas were examined during the secondment:

- corporate planning
- staff selection
- assessment of staff
- training and development
- external relations
- systems and procedures
- application of computers

It was also part of the aim of the project to exchange ideas with managers about current educational issues relating to young people over sixteen. The objectives of the secondment, which were agreed by the teacher and manager concerned were to identify current industrial practice, examine it and translate it into the field of education.

In the case examined, these objectives were felt to have been well achieved. Another secondment, which was part of the same overall programme was less successful. Even so, the written objectives of the secondment were largely met. In the more successful case, the teacher came away with implementation plans in Planning, Staff Development and Training and, according to the British Gas manager, was still 'buzzing with ideas, six months afterwards'.

A formal evaluation questionnaire, designed by UBI and LEA representatives, was used at every phase of the project. Every participant was asked to write a formal report on their secondments; and they all met at the end of the following term to review their progress with implementation, a plan which reinforced their intention to follow up the secondments. The British Gas manager expressed his surprise at the extent of follow-up. He attributed the especial success of the head of faculty secondment to the teacher's willingness to reveal his personal objectives and to his enthusiasm, which impressed other managers in the company: he would be willing to repeat the exercise. The teacher himself felt that both he personally and his college had gained a great deal from the experience, which had prompted him to apply for a further course at the FE Staff College.

South Wales Electricity Board Secondment

This is one of a series of secondments of headteachers, deputies and LEA advisers to companies in Wales arranged by UBI. Ten to fifteen secondments run in parallel; they usually last one term and the secondees meet for an induction week at the beginning and a debriefing week at the end. In an earlier secondment, the Board (SWEB) paid the salary of the secondee, but this arrangement would have to be reviewed for further secondments. In the current UBI secondments, the LEAs provide salary and cover for headteacherss on secondment.

The general aim of the secondments is to strengthen the links between industry and education and to increase awareness of the needs of industry in schools. The secondment examined in this project took place in the middle of industrial action in the schools and the headteacher's initial response to this invitation was one of horror at the idea of leaving his school at such a time; but his deputies persuaded him to go. The initial reaction of managers in SWEB was mixed but most of them recognised the need for better contacts with schools and the headteacher felt he was made very welcome.

The Education and Training Officer for SWEB who arranged the secondment met the headteacher twice before the secondment to agree objectives and make plans. The objectives were:

- to gain an understanding of electricity supply at head office and district levels;

- to foster links between SWEB and schools;

- to examine management training for supervisory staff.

The third of these was a project which continued throughout the period of secondment. It was selected by the headteacher from a list of three possibilities put forward by the Education and Training Officer (the others were Appraisal and the use of selection tests).

The first half of the one-term secondment was agreed and then fixed: it consisted of short attachments to key functions in Head Office, a visit to a district and attendance at a three-week 'Effective Management' course at the Electricity Council's staff college. The latter was to help the headteacher with the management training project; but it had the very considerable side benefit of exposing him to what he found to be an excellent management training course. At the end of this half of the secondment, the Education and Training Officer and the headteacher met to review the secondment so far and to plan the remainder of it.

The management training project continued with an investigation of other external training resources that SWEB might use; but to some extent the headteacher felt that some decisions about management training, taken while he was away on the course, had cut across his project and to some degree reduced his commitment to it. He spent some time in other departments in the final period and the Board used his expertise to help plan an Open Day and to brief people in SWEB on developments in schools.

The induction and debriefing weeks were arranged by the Polytechnic of Wales and UBI at a residential centre. The headteacher interviewed felt that the final week was too long for what it set out to do, although this (apparently) was not the view of most of the secondees. Industrialists and chief advisers from LEAs were invited to a session in this course to hear composite presentations from secondees. Again the headteacher interviewed differed from the majority in feeling that they were too generalised and that not enough use was made of the diversity of experience of the secondees. The group as a whole rated the course as of particular value.

Following the end of the full time secondment, contacts between SWEB and the school had continued: their Personnel Manager and the Education and Training Officer had visited the school and there had been contact between a craft instructor and a computer specialist and the school; a deputy head had advised SWEB on the Youth Training Schemes (YTS). The headteacher himself had reviewed his own way of working and had changed the management structure of the school. He had also recognised the severity of competition to get into SWEB, and that employment prospects were poor. He noted the contrast beween the training at the centre and the somewhat autocratic nature (perhaps necessarily) of some decisions made by senior management.

SWEB felt that this secondment had been a success and they would use the same format again. They felt that attachments to some departments might with benefit have been longer and that the options after the first half of the secondment might have been made clearer.

4. DISCUSSION

Industrial Involvement in School Management Training

Initatives in school management training precede 1983, but the provision of funding as a result of DES Circular 3/83 gave a major impetus to training in general and industrial involvement in particular. Industry has contributed in many different ways, a variety which has been healthy and productive.

Individual companies like Rank Xerox and individual industrialists like Dr Bertie Everard have become very influential; and UBI has played and continues to play a notable part, facilitating and enabling an effective industrial contribution to training in schools, especially management training.

The NDC which gives central support and guidance to the whole activity, maintains significant links with industry and commerce.

The general climate in which this new venture was introduced was unpropitious: schools and teachers were under public attack for their performance. It needs to be recognised , as our more successful industries have recognised in their field, that the effectiveness of the education service needs to be improved nore merely at the level of the school but at every level.

But any barriers that there might have been to teachers learning from industry seem to have been quickly dismantled once managers and teachers started working together. This has been helped by the open-mindedness of the teachers and the attitude of industrial trainers who have seen their role as sharing experience without claiming omniscience.

As a result of their contacts, industrial trainers have ended up with a high regard for the quality of the headteachers they have met and a recognition of the enormous and growing complexity of their work. The professionalism of industrial training has come as a revelation to some headteacherss and, since it is not primarily a matter of resources but of personal skill, style and attitude, it has provided a challenging model for them.

Partnership in Training

This report makes a distinction between four roles in school management training: the providers, the LEAs, the industrial contributors and the participants. This is done to make the analysis clearer, but, more particularly, to improve the communication and application of its recommendations. The distinction is not always valid: in some of the cases described above the industrial contributor is also the provider; sometimes the 'provider' is in fact a partnership between the UBI and a company, typically with UBI handling administration and the company carrying out the training itself. Nevertheless, the classification has some utility.

Providers

Design and preparation

Much has been learned from the early programmes, not only about the content and the conduct of programmes but also about the process of design and preparation. The foundation of good programme design is to be clear about the aims of the client (usually the LEA) in sending people on the programme. If the client has a management development policy from which nominations for training proceeds this will usually make clear what is looked for as an outcome. If not, then the provider's questions about aims and objectives may stimulate some thinking about policy in the client.

It is a great advantage if aims and objectives can be shared amongst all the parties: the LEA needs to know so that it uses training carefully, to improve the performance of its schools; the provider, so that the design is appropriate; the industrial contributor, so that he can fit his contribution in; and the participant, so that he/she knows what to expect and what is expected of him or her. Experience shows that it is of great value to the provider to involve at least some of the participants in planning a training programme. In some of the OTTOs examined, participants in an earlier course are involved in the planning of a subsequent one. Building a 'learning link' like this from one course to another in a sequence of courses is of great value for the continuous development of the programme. Even better (or perhaps in addition to this) is to include some new participants in the planning process. Some forms of training, for example, secondments, absolutely require the participant's full involvement in design and preparation.

Sharing the process of design and preparation in this way is not just to gain the benefit of the various partners' contributions; but also to engage them in the process. For the participant this becomes a matter of ownership and induction which saves valuable time during the event itself. If training trainers is amongst the objectives of the programme, the event itself can become a live case study; and not only at the design stage but throughout the running of the programme.

Designing a training programme so that it is not just an assemblage of lectures, visits, exercises and so on is, of course, a skill in itself; a skill which makes an enormous difference to the impact of training. Pace - including variation of pace - flow, continuity, flexibility and discretionary time are all important. Headteachers in general seem to have benefitted much more from experiential methods than from formal inputs. It is not a question of either/or: rather of balance, sequence and timing. Two of the most highly valued outcomes of training, to headteachers themselves, have been an awareness of the importance of process and a growth in their own self-confidence (see below, p 28): perhaps they should appear more explicitly amongst the objectives.

Another learning point about the training process itself is the value of a residential period at or near the beginning of a training event. This works equally effectively in events as different as an OTTO and a team

secondment because it addresses so many needs at that point in the training process: it brings the individual participants together and makes of them a training group, in which they can support and learn from each other; it shortens the settling-in process; it enables the trainers to get to know, and to become known by, the participants.

Providers often need help in finding appropriate industrial contributors. Organisations like UBI (especially), the Industrial Society and the Association of Teachers of Management can often do much more than provide suitable contacts in industry. It is worth making use of them, in the first instance, to find the most suitable industrial partner in a training venture. But it also serves to achieve a much-needed widening of the number of industrial contributors. It remains the provider's responsibility to ensure that the contribution matches the objectives of the programme and is properly integrated into it.

Plans for evaluation and for any follow-up of the training event need to be laid at this stage; they should be seen as part of the process of training and not just tagged on as an afterthought.

Careful communication about the time, place, accommodation and any preparatory work expected are important as a courtesy to the participants but they also affect the credibility of the providers; and when the participants are to be trainers themselves it is a question of setting a good example.

The event itself

An issue in running any training programme is how far you stick to the original design or change it to meet new needs and opportunities. It is a matter of balance between structure and control on the one hand and flexibility and freedom on the other. Perhaps the most important thing is that the provider remains conscious of the issue at all times. It may be that the early sessions will be more structured than the later ones, as participants are encouraged to take more responsibility for their own learning. Parts of the programme may be usefully left open, for the exercise of their own initiative. The sensitive adjustment of the programme is made easier and more natural if there is frequent review and feedback of how participants are experiencing the training.

The provider has a special responsibility to make explicit the unfolding pattern of the programme. This is especially necessary, and sometimes difficult, with contributions which are outside the complete control of the provider. Problems are less likely when contributors have been involved at the design stage, but links and transition still need to be articulated. Another link, which can begin to be forged during the training event itself, is with the follow-up which has been planned: for example, the use of the training group as a support network afterwards.

Follow-up

A useful way in which to reinforce the network is to invite all the participants to meet after, say, six months and report back to each other and to the providers on their progress. Sometimes this has been linked with the presentation of individual written reports; and representatives of industry and of LEAs have been involved. An imaginative development of this idea is to time this meeting to co-incide with the first get-together of the next cohort. This puts the participants in the earlier course on their mettle to have made progress that is worth reporting; it motivates the new participants, by demonstrating what can be achieved and what is expected of them; and it extends the network.

The provider can often help participants to continue with their own development by providing contacts, reading suggestions and so on. It is a healthy sign when provider and participants keep in touch after a training event and the provider knows how they are getting on.

Systematic feedback and evaluation are most valuable when they are used, preferably while the event is fresh in people's minds, to develop the training design. Then the programme is likely to remain a living process rather than become an ossified shell. It is the way in which evaluation information is used in a review process that really matters, not the details of any particular evaluation instrument.

LEAs

Design and Preparation

Too often people are sent off on training programmes (and not only in education!) as a result of a 'this-course-is-on-offer-who-is-available' sort of process. Ideally, people should be sent as part of a broader management development strategy for an authority and of a specific plan for the individual both of which have been properly communicated.

Where such a strategy exists it provides:

- o criteria for selecting which individuals to send on what sort of training;
- o a basis for giving participants long notice of a future training event, which, in turn, enables good use to be made of a development opportunity that arises from the absence of a headteacher;
- o specific objectives for the individual attending a training event, a clear indication of what is to be followed up;
- o a justifiable basis for sending people for training rather than inadequate ones like 'to give them a rest', or indefensible ones like 'to get them out of the way while we reorganise the curriculum'!

Once the strategy is clear, various options for the method of training can be properly considered. From this study, for example, some very interesting options appeared.

One of these is the idea of sending people not as individuals but as groups from the same school. Different applications of this idea are to be seen in the Oxfordshire team secondments and the UBI/Royal Insurance courses in the north-west. This is a much surer way of bringing about effective change in schools. If you send an individual on a course, even a headteacher, there is always a risk that new learning will not survive the implementation barrier. But if you send the top team (assuming that the training is competent), change should be unstoppable.

Secondly, some kinds of training do not seem to stand very well on their own. For example, unless a secondment is simply to increase awareness of industry, it probably needs to be linked with other, more formal methods; as, for instance, when a secondment is seen as an individual's follow-up to attendance at an OTTO.

A related point is that an OTTO alone is not seen to be sufficient training for trainers. In one case secondment to an industrial training department seemed to be an ideal complement to an OTTO. Where it is clearly an objective of a particular OTTO to train headteachers to go back to run management courses in their own authorities, more could be done to use the OTTO programme itself as a vehicle for training.

The event itself

Normally, the LEA will not be very much involved in the event itself. But, even if not, it is worth considering whether there is any way in which LEA staff should keep in touch, for example, by attending selected sessions where they might make some contribution. This demonstrates the support and commitment of the authority, but it also enables it to discern any re-entry problems that might have to be dealt with later.

Follow-up

Any such problems can best be dealt with in the context of a careful review with each participant of his or her experience of the training. Further training needs and plans can be discussed. Above all, it should be made clear what space is available for the exercise of initiative and how the LEA intends to employ the newly acquired skills and insights. The climate should be one that expects and welcomes change. Calling for a written report should be more than a formality: it should demonstrate a keen interest in the training and provide a basis for encouraging the participants to implement what they have learned.

As a support for follow-up, LEAs could usefully build up a register of local companies which are prepared to offer some kind of help: courses, speakers, secondments, places on internal courses or just contacts. Continuing links amongst teachers and schools, local employers and LEAs are an important outcome of school management training but are also a necessary condition for its future healthy development. UBI can be of great help here, too.

Another expected outcome should be the improvement of in-service training; this too may be an appropriate topic for follow-up training.

As with all training, from time to time a broader review needs to be held covering:

- o the effectiveness of current methods of training;
- o whether the right people are being trained;
- o whether follow-up is taking place;
- o whether schools are improving as a result.

Industrial contributors

Design and preparation

As with the other partners in training, the industrial contributor needs to be concerned about objectives. Typically the contribution will be part of a broader training activity. The ideal is to become involved at the design and planning stage with the provider, in order to contribute to the design and planning process itself and to be able to take it into account in preparing the industrial component, both the content and the process.

Participants have commented favourably when the industrial contributor has translated and adapted company training to a school background. This requires the industrial trainer to gain as much insight as he or she can into the participants' work situation. Again this is easier to do if the trainer is involved at the outset with the provider and with participants.

In the absence of this it should still be possible to check out the objectives of the industrial training with the particpants at the commencement of the training and to monitor their appropriateness as the programme proceeds.

Secondments are not the easiest form of training to design well. It seems important to select the right sort of persons both from school and company to work together. The person seconded needs to be an avid learner, able to get involved and be 'switched on' by any opportunity that arises; the industrial mentor needs to have sufficient commitment, time and energy to overcome the inevitable hurdles that arise in organisations. They both need to agree the objectives and methods of the secondment at the start, remembering to look for benefits to both parties. (It seems that companies that do not seek do not find a benefit in this form of training!)

Because they are difficult to organise well, secondments sometimes relapse into a sort of 'Cook's Tour' which may be all right for finding out what goes on in companies but does not give any training. For this the industrial trainer needs to be something of an opportunist in using his current situation as a vehicle for training: he needs imagination to see the potential for getting the teacher involved with real problems and the courage to take the risk of doing it.

The quality of industrial trainers will inevitably be subject to close inspection from teachers; so only the good ones should be used. A less obvious point is that it is often very helpful if they reflect openly with their visitors about the choices they are making and the problems they are meeting. The most popular and effective methods with headteachers are experiential. Formal lectures on the workings of internal company functions are of limited value and often of even less interest.

The event itself

What has impressed teachers about industrial trainers is not just their professionalism but their care and concern for the teachers themselves (no doubt the trainers would argue that this is part of their professionalism). It is important to avoid talking down to participants or treating them as though they have no experience of management problems such as handling change (there have been some exceptions to prove the rule). Industrial trainers in this situation are not just doing their job: in all their actions, administrative and teaching, they are setting an example of good training.

Trainers would also say that it is part of their professional skill to be alert to newly emerging needs, as a programme proceeds; to remain flexible; and constantly to tie in their subject matter to the participants' situation, with illustration and example.

Follow-up

Industrial trainers have usually been willing to provide whatever help they can with the implementation of action plans made during training and with other follow-up work; in some cases they have become involved, formally or otherwise, in consultancy in schools.

They need feedback from participants and providers about their contribution and they will want to review it while the event is recent in order to capture learning points for next time. They will also want to assess the benefits coming to them and their companies through their involvement.

Participants

Design and preparation

One of the reasons for LEAs to clarify their objectives and communicate them to their teachers is to enable the teachers themselves to prepare well for a training event. Teachers who are not told why they have been nominated for training should be entitled to ask. There is then a better chance that they will respond readily to invitations to take part in the design and planning stage. Again, this is not merely for the sake of the contribution they may make to the design, important as that may be, but because they can then prepare themselves more thoroughly for training. They can see the event as part of a process of development, not as an isolated experience.

Some formal preparation - reading, case preparation and the like - may be called for. But it is more than that. They should be motivated to make their own assessment of what they expect from the training in knowledge, skill and attitude. It is also part of their development to organise the use of their absence for the development of their senior staff.

The event itself

On the whole, headteachers have been very responsive to the training they have received and tolerant of the shortcomings associated with piloting new training events. These events seem to have succeeded best when participants have been drawn into participating fully and taking responsibility not only for their own learning but for the success of the event as a whole. Many of them made a real effort to be open to new learning opportunities (without losing their critical faculties!).

They have sought and have often found ways of gaining support for their continued development from the providers, from industrial and other contributors and from their fellow-participants. The way in which a network of colleagues is highly valued says something about the isolation of a headteacher's job.

Follow-up

It has often been difficult for headteachers returning to schools, riven with unrest, to implement their action plans. Some of the more delicate issues, like appraisal, have had to be deferred. But many have managed the follow-up with determination and self-discipline. And some of the formal written reports produced by headteachers after a period of training are impressive in their grasp of the content of training and their perception of its relevance to the schools. Their feedback has been valuable to providers and contributors for the improvement of the training.

Taking new learning, action plans and a feeling of renewed enthusiasm back into the 'old' situation is often fraught with difficulty, esspecially when colleagues there have been bearing the heat and burden of the day while the headteacher has been away. So it is a real test of management skill to be able to share something of the experience with colleagues in such a way that they feel invited to join in an exciting venture and not hit over the head with the boss's latest craze! This challenge applies not just to individuals but also to groups returning from a team secondment: how to avoid the appearance of elitism or the risk of seeming to overwhelm 'the opposition' by strength of numbers.

General Conclusions

The impetus of this new activity has been, perhaps surprisingly great. And even though many headteachers and schools have not been touched by it, the volume of training undertaken since 1983 is considerable, especially bearing in mind that the education service has been in turmoil for a substantial part of that period. For the teachers and the schools involved the effects have been considerable. (I sat in on one course

and, listening to a group of teachers, invited back from a previous course, describing what they had accomplished in their school since their training, realised that if it had been a report from a group of managers in my company I would have been astounded and delighted!).

In this project there has been an attempt to examine as many different types of education-industry collaboration as possible. Where it has been appropriate, comment has been made above about specific points that seem to make for greater effectiveness in particular forms of training: for example, about the personal requirements for both mentor and secondee in secondments. But the over-riding conclusion is that the same features of thorough preparation, sensitive and flexible training and careful follow-up hold good for all forms of training. The variety of ways of collaborating is to be welcomed especially at an early stage in school management training; it has led to the rapid accumulation of experience. Inevitably, not all of the training is as successful as the best examples and it has to be said that this survey has sought out good rather than bad practice. But there is still scope and need for more experimenting.

Reference has been made to the heavy demands made upon some industrial training departments. Some of the companies involved take the view that putting time and money into this activity is a legitimate part of their social policy. But such involvement is justifiable on more than these rather altruistic grounds. It is also a matter of more immediate enlightened self-interest: not merely to influence the educators of future employees, but also to have contacts with schools so that employment practices can be attuned to them.

Having said that, there remains a risk that willing horses may be ridden too hard. What is really needed is a much wider group of industrial partners. Many companies other than those currently involved might well provide help if they were approached for something quite specific and at the right level (not necessarily the top). Since 'quality' is at least as important as 'width', there is need for an organisation like UBI to advise on the right sort of company and act as honest broker between need and opportunity.

One might wonder why it is that the industrial trainers' contributions to school management training are so highly valued. Is it because it is of such peerless quality? Now it seems, to one observer at least, that some of the industrial offerings are very good indeed. But their undoubted quality does not constitute an adequate explanation. (It is another irony of the situation that, in a country much criticised for its lack of attention to industrial training compared with its overseas competitors, it is the quality of that training which impresses headteachers: perhaps the problems here as in education lies not in us but in those who have become our 'stars'!).

Over and over again when listening to headteachers describing their experience of industrial training, one has the sense that the need was so great and so unprovided for that almost any training would have been well received. School management training has been, perhaps still is, in a honeymoon phase: it is fortunate that early experiences have mostly been happy ones so that its future may be expected to be fruitful if not always blissful!

Needless to say, this is not to decry the significance of high quality training. Rather is it especially valuable at this stage because much of the training serves as a model for training programmes which headteachers themselves go on to design and run for their own authorities. So it is a matter for congratulation that they judge these models to be professionally excellent.

There are two other outcomes, described by headteachers themselves, that are worth highlighting. Heads have become aware as a result of their exposure to industrial training, that management is about process, not just about content; how you do what you do. So they have begun to see that what they as managers are responsible for is the processes within their schools. This is all the more important because teaching as a profession is more likely than some others to be overconcerned about content at the expense of process.

The second outcome is perhaps surprising (it was to me at least). When headteachers were asked what was the most important contribution to their own personal development of their training, the word that was most often used was 'confidence'. Yet are not these the very people who are seen by the rest of society as epitomising self-confidence. What could they mean? Inevitably, different things: but it usually had to do with a fresh recognition that they could try out new things in their schools. The could see scope, excitement and challenge in the role of making things better through managing them better. One headteacher described it as feeling that if he were asked to take a job managing something other than a school he would now be inclined to say 'Yes'.

5. RECOMMENDATIONS

To Providers

Clarify the aims of the training with the 'clients'.

Encourage LEAs to develop management development strategies.

Share the aims with contributors to the training and work with them on objectives and methods.

Involve participants as much as possible in this process.

Consider using participants as 'learning links' between one course and the next in a series.

Use a course for training trainers as a live case study: everything that happens is a learning point.

Design a course as a process with continuity, variety and flexibility; so that the result is more than the sum of the parts.

Prefer experiential methods.

Include awareness of the concept of management as a process in the explicit objectives.

Include the development of confidence in the objectives, too.

Use the advice of 'umbrella' organisations like UBI to find suitable industrial contributors (see Appendix 3).

Integrate external contributions carefully.

Include plans for follow-up and evaluation at the design stage.

Set an example of immaculate administration.

Maintain a conscious balance in running the course between structure and flexibility.

Bring out continuity and links in the programme as it progresses.

Lay the groundwork for later follow-up plans.

Arrange a follow-up meeting of participants.

Consider linking this with the initial meeting of new course participants.

Provide whatever help you can to participants and keep in touch.

Collect, evaluate and apply feedback to improve the training.

To LEAs

Produce a management development strategy for your authority.

Use it to specify training and select participants.

Brief nominees for training about the objectives and expected outcomes of training.

Prompt the use of a headteacher's absence as a development opportunity for others.

Consider sending school senior management teams as a group on a training course.

Arrange additional trainer training for headteachers who are to run courses; OTTO is not enough.

Demonstrate support for training by keeping in touch with people during their training.

Review the response to training with each participant and encourage follow-up.

Build up a register of local companies prepared to help with school management training; use the help of UBI and others (Appendix 3).

Review periodically the progress and results of training against your management development strategy.

To Industrial Contributors

Be clear about the overall objectives and design of the overall training programme.

Adapt training materials to participants' situations.

Set up secondments and select secondees very carefully.

Get secondees involved in real problems: take some risks.

Use your best trainers.

Prefer experiential methods.

Help participants with follow-up in any way possible.

Obtain and use feedback to improve future contributions.

Seek benefits for your company: use school contacts as an information resource.

To Participants

Become clear about the objectives of the training. If you are not sure, ask.

Be ready to get involved in design and planning of training.

Do your prep: both what is asked for by the provider and for yourself.

Enjoy being in the role of learner - but remain responsible for your own learning.

Take help with follow-up from providers, contributors and fellow participants.

Value and use the network of colleagues.

Regard sensitive implementation of action plans as a test of management skills.

COLLABORATION BETWEEN EDUCATION AND INDUSTRY/COMMERCE ON SCHOOL MANAGEMENT TRAINING

- Project Background
- Personal Background

AIM
- To identify good practice across a range of different sorts of collaboration in various parts of the country;
- to gain an understanding of the reasons for more and less successful outcomes : and
- to publish the results as a guide to future practice.

1. BEFORE THE TRAINING EVENT

1.1 Who took what initiatives?

1.2 How influential was the DES?

1.3 How were industrial/commercial collaborators found?

1.4 Anyone else play a role - UBI, Ind.Soc. etc?

1.5 How did those who later became involved react initially (head teachers, LEBs educational institutions, Industry & Commerce)?
e.g. How did people feel about the scope for, and value of collaboration
in management training?
in Education?
in Industry and Commerce?

1.6 What did people see as the objective of collaboration : what did they really want to achieve?

1.7 What collaboration was there in the design and preparation of the training event? How did it go?

1.8 Was any flexibility built into the design?

1.9 Was any follow-up built into the training design?

1.10 What if any plans for evaluating the training were made at this stage?

2. DURING THE TRAINING EVENT

2.1 What form did the training event as a whole take? For how many participants?

2.2 What form did collaboration with Industry/ Commerce take?

2.4 Did the event go 'according to programme' : were any changes made 'en roúte' ?

2.5 How did the participants, the industrial/commercial contributor(s) and the organisers (seem to) feel about it at the time?

2.6 Did any 'hidden agenda' emerge?

2.7 Did anyone's views of the aims change during the training? (participants, industrial/commercial contributors, organisers)

2.8 Did any of the parties' commitment change, either way?

3. THE IMMEDIATE OUTCOME

3.1 What follow-up plans were there?

3.2 What plans for implementation were made by individuals and/or groups? Were they realistic?

3.3 How did those concerned feel at the end of the main event : what was the level of their commitment?

- participants
- industrial/commercial contributors
- organisers

and did those feelings change later?

3.4 Was there any formal evaluation at this stage and if so what (e.g. a course review, or a formal report)?

4. LONGER-TERM IMPLEMENTATION

4.1 How long ago was the training event?

4.2 What if any information is there on changes resulting from training in behaviour or outlook?

- of the participants
- of others (contributors, organisers, colleagues, subordinates)?

4.3 Were the follow-up plans, carried out?

4.4 Have those involved (participants, industrial/commercial contributors, organisers) any further plans?

cont.....

5. EVALUATION

5.1 Have any later evaluations (reports or assessments) been made?

5.2 On the basis of what criteria are people making assessments

- participants
- contributors
- organisers ?

5.3 What are now seen to have been the most significant features of collaboration and why?

5.4 Are there any industrial/commercial elements in the training about which participants feel either particularly warm or antipathetic?

5.5 What contribution has the training made overall to the participants' development : where are they now?

5.6 Any further comments?

ACC/AS
23 May 1986.

NDCSMT EDUCATION/INDUSTRY TRAINING LINKS

EDUCATION COURSE	INDUSTRY COURSE	IN INDUSTRY
1. Single session	5. One day module	8. 1 day visit
2. 2/3 day module, eg OTTO/20 day (a) Within course (b) Free-standing	6. Whole course specifically for Education	9. 2-5 day visit 10. Attachment - longer term - study interviews etc
3. School/Company link	7. Participation alongside non-Education people in:	11. "Twinning" (eg Burma-Castrol)
4. Module in an award-bearing course, eg Leicester University, Warwick University	(a) Company course (b) Business School etc type course	12. Secondment (working in role)

Appendix 2

ACC/sq
25.3.86

UBI AND CENTRAL INDUSTRIAL ORGANISATIONS

UBI Headquarters

Sun Alliance House, New Inn, Hall Street, Oxford OX1 2QE. Tel 0865 722585

UBI Regional Offices:

Northern Area Office

3rd Floor, Priestley House, Sankey Street, Warrington WA1 1PW.
Tel 0925 51251

Midlands Area Office

School of Education, University of Leicester, 21 University Road,
Leicester LE1 7RF. Tel 0533 544080

Southern Area Office

c/o British Aerospace plc, Naval Weapons Division, FPC 109, PO Box 5, Filton,
Bristol BS12 7QW. Tel 0272 693831 ext 6021

Scotland and Northern Ireland

Adelphi Education Centre, 12 Commerical Road, Glasgow G5 0PQ.
Tel 041 429 4575

Wales

c/o British Gas Wales, Ferry Road, Grangetown, Cardiff CF1 7XR.
Tel 0222 33131ext 4025/6

UBI/Rank Xerox National Education Programmes Unit

Shendish House, Hemel Hempstead, Hertfordshire HP3 0AA. Tel 0442 50588

Association of Teachers of Management (ATM)

c/o The Polytechnic of Central London, 35 Marylebone Road, London NW1 5LS.
Tel 01 486 5811 ext 259

British Association for Commercial and Industrial Education (BACIE)

16 Park Crescent, London W1N 4AP. Tel 01 636 5351

British Institute of Management (BIM)

Management House, Parker Street, London WC2B 5PT. Tel 01 405 3456

Confederation of British Industry (CBI)

Centre Point, 103 New Oxford Street, London WC1A 1DU. Tel 01 379 7400

Education for Industrial Society

Robert Hyde House, 48 Bryanston Square, London W1H 7LN. Tel 01 262 2401

The Industrial Society

Peter Runge House, 3 Carlton House Terrace, London SW1Y 5DG. Tel 01 839 4300

NATIONAL DEVELOPMENT CENTRE FOR SCHOOL MANAGEMENT TRAINING
35 Berkeley Square, Bristol, BS8 1JA

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